

# **SAMPLE GTA APPLICATION**

## **Expansion of Huckleberry Jim's Production and Retail Sales**

**Applicant:** Huckleberry Jim's Fantastic Jams, Inc.

Angelyn Stonebraker, Owner  
Huckleberry Jim's Fantastic Jams, Inc.

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**Tax ID:** 81-5555555

**Duration of the Project**  
January 2006 - January 2007

Huckleberry Jim's does not currently have plans to request additional GTA funds.

**The Montana Department of Agriculture's Growth Through Agriculture (GTA) program has developed this sample GTA application for potential applicants to view. The business, products and persons mentioned in this application are fictitious and not intended to resemble or represent any actual business, products or persons.**

**With questions about the Growth Through Agriculture program, contact the GTA program manager at (406) 444-2402, or by email at [agr@mt.gov](mailto:agr@mt.gov).**

## **Executive Summary**

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A recent scientific breakthrough has opened the door for explosive growth in the huckleberry product industry: huckleberries can now be produced commercially, rather than only garnered through the harvesting of natural crops. This has led to a market opportunity for Montana farmers and ranchers - production of huckleberries for Huckleberry Jim's national expansion.

Growth Through Agriculture funds are requested to help Huckleberry Jim's expand production and retail sales from a local to a national level. This will be accomplished through attendance of three national trade shows, development and placement of advertisements and updating of Huckleberry Jim's website.

The results of this project will be Huckleberry Jim's increased retail accounts, increased sales, the hiring of a marketing manager at \$30,000 annually and the contracting with six Montana farmers and ranchers for huckleberry production (diversifying their production) for a total of \$60,000 annually.

## **Identification of Need or Opportunity**

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A recent scientific breakthrough has opened the door for explosive growth in the huckleberry product industry: huckleberries can now be produced commercially, rather than only garnered through the harvesting of natural crops. The commercially grown crop is equal to the naturally grown crop, both in quality and quantity.

With the widespread availability of this new technology, the first movers will be the ones to prosper. From previously conducted market research, it is known that it is imperative for Huckleberry's Jim's survival to move quickly to secure a presence in the huckleberry retail sales market, as well as to secure producers of the increasing amounts of huckleberries demanded.

Huckleberry Jim's currently sells fresh and dried huckleberries, as well as huckleberry-based products, including jams, jellies, candies and syrups. These products are sold to consumers via retailers and Huckleberry Jim's website. Up to now, due to limited supplies of huckleberries, Huckleberry Jim's has sought retailers only in western Montana. With the newly developed potential for growing huckleberries commercially, Huckleberry Jim's can now branch out, selling products to retailers throughout the northwest United States, and eventually, the entire United States and even Canada.

This is not only an opportunity for Huckleberry Jim's, it is also an opportunity for Montana farmers and ranchers to diversify their operations by growing huckleberries in addition to other crops on their property. This project provides diversity and value-added income to Huckleberry Jim's huckleberry producers and harvesters.

Huckleberry Jim's, with the help of the Growth Through Agriculture program, will utilize recent market research and marketing plan development

to increase its retail store accounts, thereby increasing its sales, thereby increasing the demand for commercially grown huckleberries, thereby increasing the opportunities for Montana farmers and ranchers to diversify their operations and garner value-added product sales - totally approximately \$60,000 annually.

## Statement of Objectives

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Huckleberry Jim's, with the help of the Growth Through Agriculture program, will seek to accomplish the following objectives:

- Increase retail store accounts by 50% by November 1, 2006.
- Increase retail sales by 50% by November 1, 2006.
- Provide \$60,000 of diversified income annually for 6 Montana farmers and ranchers.

## Deliverables

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The financial assistance provided by Growth Through Agriculture Program will garner the following results:

- Huckleberry Jim's huckleberry production contracts, amounting to approximately \$60,000 annually, with 6 growers in Montana.
- Huckleberry Jim's hiring of a full-time marketing manager at a salary of \$30,000 annually.
- Huckleberry Jim's attendance of three national retail sales trade shows: the NASFT's Winter, Spring and Summer Fancy Food Shows.
- Huckleberry Jim's advertisements in industry publications and website update for increased national attention.

## Plan of Work

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Below is an outline of the aforementioned activities and persons responsible.

Date(s)	Activity	Persons Responsible
January 2006	Hire full-time marketing manager	Stonebraker & Raffelson
January 22-24, 2006	Attend 31st Winter Fancy Food Show in San Francisco; follow-up with new accounts begins upon return	Stonebraker & Raffelson
February 2006	Establish huckleberry production contracts with 6 growers	Stonebraker & Raffelson

## Plan of Work (continued)

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Date(s)	Activity	Persons Responsible
March 2006	Begin development of advertisements and update of website	Stonebraker, Raffelson & Farnam
May 7-9, 2006	Attend 8th Spring Fancy Food Show in Chicago; follow-up with new accounts begins upon return	Stonebraker & Raffelson
Summer 2006	Huckleberry harvest begins	Montana Farmers & Ranchers as contracted
June 2006	Advertisement development and website update finished; Advertisements placed in industry publications	Stonebraker, Raffelson & Farnam
July 9-11, 2006	Attend 52nd Summer Fancy Food Show in New York; follow-up with new accounts begins upon return	Stonebraker & Raffelson
October 2006	Second run of advertisements	Stonebraker, Raffelson & Farnam
January 2007	Evaluation of project	Stonebraker & Raffelson

## Potential Use

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This project - the expansion of Huckleberry Jim's production and retail sales - will have a ripple effect upon Montana's agricultural economy. As commercial production of huckleberries was heretofore not in existence, the expansion of Huckleberry Jim's retail sales demands an expansion in huckleberry production, which provides opportunities for Montana farms and ranchers to diversify and expand operations. The annual gross income from this endeavor to production agriculture in Montana is approximately \$60,000. In addition to the improvement in Montana's economy by the influx of additional Huckleberry Jim's retail sales, a full-time marketing manager position will be added at a salary of \$30,000 annually.

The success of this project also means the success of Huckleberry Jim's, and Montana benefits by maintaining another of its small businesses – the backbone of Montana's economy.

## **Key Personnel**

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Below is an outline of the key personnel who will be involved with the expansion of Huckleberry Jim's production and retail sales.

Angelyn Stonebraker – owner of Huckleberry Jim's. Angelyn will maintain her current role as production supervisor and will assist the new marketing manager with all aspects of this project.

Marty Raffelson – proposed new marketing manager hiree. Utilizing her previous marketing manager experience (Smoky Mountain Jams, Idaho), Marty will assist Angelyn in her role as production supervisor, as well as supervise all Huckleberry Jim's marketing activities.

Ann Farnam Marketing, Inc. – proposed consultant firm. Utilizing her 10 years' experience in gift product marketing, Ann will assist Angelyn and Marty with design and placement of Huckleberry Jim's advertisements, as well as with the update of the website.

## **Facilities and Equipment**

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All facilities and equipment necessary for this project have been purchased by Huckleberry Jim's utilizing private funding. No Growth Through Agriculture funds will be sought for the purchase of facilities and/or equipment.

## **Current and Pending Support**

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Montana Farmers and Ranchers – currently 6 Montana farmers and ranchers have been approached and indicated their interest in diversifying their operations by producing huckleberries for Huckleberry Jim's.

Montana Financial Institutions – Sam Johnson, president of the Montana Farmers Bank in Helena, has provided financial support (loan) of Huckleberry Jim's expansion.

Montana Economic Development Agencies – Scott Hain, president of the Montana Agency for Economic Development, has indicated support of Huckleberry Jim's expansion, as it relates to the improvement of Montana's economy. Furthermore, Alan Colter, Executive Vice President of USDA – Rural Development, has provided financial support (grant) of Huckleberry Jim's expansion.

## **Proposed Budget**

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Below is an outline of the proposed budget for the expansion of Huckleberry Jim's production and retail sales. A total of \$40,000 will be the GTA investment funds request, with \$114,200 matching funds (\$37,000 cash and \$77,200 in-kind). The total cost for the project will be \$154,200.

Consultant Services - design of advertisements (\$6,000) and website (\$5500), procurement of placement of advertisements (\$3,000) and semi-annual updates of website (\$1,000 each for duration of project). **GTA Investment Funds Request of \$16,500.**

Travel - Angelyn and Marty to travel to three national trade shows (\$2,400 each show). **In-kind match of \$7,200.**

Advertising & Promotion - Exhibition at three national trade shows (\$4,000 per show) and advertising placement expense (\$10,000). **GTA Investment Funds Request of \$22,000.**

Equipment - Additional processing equipment needed to increase and maintain inventory at necessary levels (\$15,000). **Cash match of \$10,000; USDA - Rural Development funds cash match of \$5,000.**

Supplies & Materials - Additional packaging inventory needed to increase and maintain product inventory at necessary levels (\$22,000). **Cash match of \$22,000.**

Communications - Purchase of a computer necessary to respond to website inquiries and sales, as well as essential to conducting business on a national scale (\$1,500). **GTA Investment Funds Request of \$1,500.**

Data Processing - No funds for data processing will be requested or utilized as match funds.

Salaries & Wages - Two full-time positions' annual salary (\$30,000 each). **In-kind match of \$60,000.**

Fringe Benefits - Two full-time positions' fringe benefits (\$5,000 each). **In-kind match of \$10,000.**

Indirect & Overhead - No funds for indirect and overhead will be requested or utilized as match funds.

## AGRICULTURAL MARKETING DEVELOPMENT PROGRAM Montana Growth Through Agriculture Program

### ***PROPOSED BUDGET FORM***

**PROJECT TITLE:** *Expansion of Huckleberry Jim's Production and Retail Sales*

**PROJECT APPLICANT:** *Huckleberry Jim's Fantastic Jams, Inc.*

**PRINCIPAL CONTACT:** *Angelyn Stonebraker, owner, Huckleberry Jim's*

**PROJECT DURATION:** *January 2006 - January 2007*

Expenditure Category	Investment Funds Request	Applicant Match	Totals
Consultant Services	\$ 16,500	\$ -	\$ 16,500
Travel	\$ -	\$ 7,200	\$ 7,200
Advertising & Promotion	\$ 22,000	\$ -	\$ 22,000
Equipment	\$ -	\$ 15,000	\$ 15,000
Supplies & Materials	\$ -	\$ 22,000	\$ 22,000
Communications	\$ 1,500	\$ -	\$ 1,500
Data Processing	\$ -	\$ -	\$ -
Salaries & Wages	\$ -	\$ 60,000	\$ 60,000
Fringe Benefits		\$ 10,000	\$ 10,000
Indirect & Overhead		\$ -	\$ -
Other (Specify)	\$ -	\$ -	\$ -
<b>Totals</b>	<b>\$ 40,000</b>	<b>\$ 114,200</b>	<b>\$ 154,200</b>